

Populate SalesRep on Quickbooks Desktop Invoice from Salesforce Opportunity Owner

Issue:

The name of the opportunity owner from salesforce to transfer over to the Quickbooks. The “alias” name of the opportunity owner is transferred over to the Quickbooks “rep” field of Invoice.

The screenshot shows the Salesforce 'Opportunity Detail' page for an opportunity named 'Testing'. A red box highlights the 'Opportunity Owner' field, which displays a user icon and the name 'Thejaswini C' with a '(Change)' link. Other fields visible include Amount (\$500.00), Expected Revenue (\$500.00), Close Date (2/26/2020), Account Name, Type, Lead Source, Products Count (1), and Tracking Number.

Above, the field is shown for the “OpportunityOwner”. This Alias field of the opportunity owner will be mapped to Quickbooks as a “rep”.

Solution:

6	state_03 e88b0- 64f7- 11e4- 9cfa- bd8588a b6b09	QuickBooks	Insert	ItemOtherCharge	Using Map
7	state_03 a53450- 64f7- 11e4- 9cfa- 873cbd0 6f05	QuickBooks	Insert	Invoice	Using Map
8	state_03 e66cd0- 64f7- 11e4- 9cfa- ff44c9ef7 84d	QuickBooks	Update	DataFxd	Using Map

To do so, in the OpportunityToInvoice workflow open the mapping for insert invoice and map the “Alias” in the schema to the FullName of SalesRepRef as shown below.

The screenshot shows a configuration interface with several sections:

- SalesRepRef:** Includes a "Loop Over" button and a "Select Field" dropdown.
- Validate Loop:** A text input field containing the value "true".
- FullName:** A text input field containing the expression `VALUE("Owner/Alias")`. This field is highlighted with a yellow border.
- LinkID:** A text input field.
- SalesTaxLineAdd:** Includes a "Loop Over" button and a "Select Field" dropdown.
- SetCredit:** Includes a "Loop Over" button and a "Select Field" dropdown.
- Field List:** A sidebar on the right containing a list of fields:
 - Name
 - AVSFQB_Quickbooks_Id_c
 - Id
 - OpportunityLineItems
 - Account
 - AVSFQB_Primary_Contact_r
 - Owner
 - Alias

And also, make sure the Alias value should be pre-existing in Quickbooks as a sales rep picklist value.

The screenshot shows a QuickBooks invoice form with the following details:

- CUSTOMER_JOB:** SyncAccountTesting
- CLASS:** [Empty]
- TEMPLATE:** Inuit Product Invoice
- Invoice Header:**
 - DATE:** 26-02-2020
 - INVOICE #:** 74
 - BILL TO:** SyncAccount
- Form Fields:**
 - P.O. NUMBER:** [Empty]
 - TERMS:** [Empty]
 - REP:** JTC (highlighted with a yellow border)
 - SHIP:** 26-02-2020
 - VIA:** [Empty]
- Table:**

QUANTITY	ITEM CODE	DESCRIPTION	PRICE E.
1	Cd		12,500.00

And Hence, In the above image, we can find the alias name mapped to the Rep field under Invoice in Quickbooks.